



SAP Enhancement Package 2 for SAP SRM 7.0: Self-Service Procurement

Based on SAP Solution Manager Content

Target Audience

- System Administrators
- Consultants

PUBLIC

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Document History



CAUTION

Before you start the implementation, make sure you have the latest version of SAP Solution Manager Content. For more information on the SAP Solution Manager content, see SAP Note [1461039](#).

The following table provides an overview of the most important document changes.

Version	Date	Description
1.0	2011-11-08	Initial version

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1 Important Information About This Document

The configuration documentation for SAP Supplier Relationship Management (SAP SRM) is delivered with the SAP Solution Manager content. To implement and configure SAP SRM, you must use SAP Solution Manager, which contains the complete configuration documentation including links to Customizing, SAP Notes, and SAP ERP documentation.

This guide contains only the SAP SRM configuration documentation and references to other documentation. It provides you with a quick overview of the required SAP SRM configuration settings.



CAUTION

This guide is a supplement to the SAP Solution Manager content and does not replace it. The complete configuration content and tool support is only available in SAP Solution Manager.

For more information on the SAP Solution Manager content, see SAP Note [1461039](#) and the SAP SRM master guide at <http://service.sap.com/instguides> under ► *Installation & Upgrade Guides* → *SAP Business Suite Applications* → *SAP SRM* → *SAP SRM Server 7.01* ◀.

Business Functions

SAP enhancement package 1 for SAP Supplier Relationship Management 7.0 (SAP SRM 7.0) includes the following business functions:

- SRM, Strategic Sourcing Innovations
- SRM, Catalog Innovations
- SRM, Approval Process
- SRM, Continuous Innovations
- SRM, Implementation Simplification
- SRM, Service Procurement Innovations
- SRM, PI-Independent Enterprise Services
- SRM, Supplier Collaboration
- SRM, Self-Service Procurement
- SRM, Analytics

For more information about these business functions, see SAP Help Portal at <http://help.sap.com> ► *SAP Supplier Relationship Management* → *Business Functions and Customizing Switches* ◀.

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2 Basic Settings for Self-Service Procurement

2.1 System Connections

2.1.1 Catalog-Specific Role Maintenance in SAP MDM

To use the SRM-MDM Catalog, you need to assign catalog-specific roles in SAP MDM Console. You assign the corresponding roles for the following tasks:

Task	Role	Comment
Manage catalog content	Catalog Manager	Responsible for importing, managing, and classifying product and contract data in the MDM Import Manager and MDM Data Manager.
Approve catalog content	Catalog Content Approver	Responsible for approving or rejecting catalog items in the SRM-MDM Catalog workflow.
Launch catalog search	Catalog User	This role refers to the search users assigned to the catalog Web service. You configure this Web service in Customizing under ► <i>SAP Supplier Relationship Management</i> → <i>SRM Server</i> → <i>Master Data</i> → <i>Content Management</i> → <i>Define External Web Services</i> ⚙.
Configure catalog search UI	UI Configuration Manager	- Responsible for setting up user-specific configuration for users who are assigned the Catalog User role. The owner of this role is authorized to configure the Java-based Web Dynpro search UI and the open catalog interface (OCI) mapping. - Responsible for configuring the search UI, for example, the field selection of the <i>Advanced Search</i> or the mapping of catalog fields to OCI fields.

2.1.2 Setting Up External Web Services in SAP SRM

To use the SRM-MDM Catalog with SAP Supplier Relationship Management (SAP SRM), and to access the SRM-MDM Catalog using URLs from SAP SRM applications, you must set up external Web Services in SAP SRM.

Procedure

- Create a Web Service with an ID, such as SRM-MDM Catalog, in Customizing for *SAP Supplier Relationship Management* under ► *SRM Server* → *Master Data* → *Content Management* → *Define External Web Services* ⚙.
- To assign the catalog to a particular purchasing organization, enter the organization in the *Purch. Organization* field.

2.1 System Connections

3. Under *Additional Functions in the Product Catalog*, set the following indicators:■ *Display Product Data Again in Catalog*

Enables the detail feature for the Open Catalog Interface (OCI), so that when the *Details* option is selected in the overview list of catalog items, product details are displayed.

■ *Validate Product Data From SAP SRM*

Enables the use of the OCI validate feature.

For this feature to work, the field **NEW_ITEM-EXT_PRODUCT_ID** must be filled with the catalog database key of the product when the product is transferred for the first time from the product catalog to the SRM Server System. The system checks if products are still available in the catalog, and if the price is still up to date. If the product data has changed, the current data is transferred to SAP SRM.

■ *Cross-Catalog Search*

Enables all catalogs with this indicator set to be searched by a keyword search.

In the navigation tree of the Customizing transaction, choose *Integrated Call Structure*.

**NOTE**

Do not define a call structure for your catalog, as these catalogs are designated to be displayed as integrated catalogs.

4. Maintain the parameters listed below, taking into account the additional information.

Parameter Name	Parameter Value	Type	Additional Information
n.a	<a href="http://<J2EEserver:J2EEport>/SRM-MDM/SRM_MDM">http://<J2EEserver:J2EEport>/SRM-MDM/SRM_MDM	URL	Required <J2EEserver> is the host on which the J2EE server is installed. <J2EEport> is the http port of the J2EE server.
username	<your_user_name> Refers to the user in SAP MDM (not the end user starting the catalog search in SRM).	Fixed Value	Required The value can be that of any user maintained for the catalog repository in SAP MDM Console ► <i>Admin</i> → <i>Users</i> . ↩
password	<your_password>	Fixed Value	Required
server	<your_MDM_server> [:<MDM Server Host n>]	Fixed Value	Required See SAP Note 1170807
repositoryType	<Repository Type> [:<Repository Type n>]	Fixed Value	Optional See SAP Note 1170807
catalog	SRM_MDM_CATALOG	Fixed Value	Required The name of your catalog repository in SAP MDM.
unilanguage	SY-LANGU	SAP-Field	Required The system uses the logon language of SRM.
datalanguage	For example <EN> or	Fixed Value Or	Required

Parameter Name	Parameter Value	Type	Additional Information
	SY-LANGU	SAP-Field	This setting controls the language dependent fields of your catalog repository.
mask	<your_mask_name>	Fixed Value	Optional  NOTE If you do not specify a mask, all users have the same unrestricted access to the catalog.
namedsearch	<your_named_search_name>	Fixed Value	Optional  NOTE If you do not specify a named search, all users have the same unrestricted access to the catalog.
HOOK_URL		Return URL	Required
returntarget	_parent	Fixed Value	Required. This parameter determines and informs the catalog to which target OCI data has to be returned.
1hwc_search	False, if you do not want to use left-hand wildcards	Fixed Value	Optional. For more information, see SAP Note 1147662

2.1.3 More Information About System Connections

The following SAP Note applies: [1287412](#) — Prerequisites for OCI Integration in SAP SRM 7.0.

2.2 Organizational Management

2.2.1 Enhancing the Organizational Plan

To make the connection between purchasing organizations and purchasing groups more flexible, you can reduce the hierarchical restrictions of the organizational model.

Prerequisites

You have created an organizational plan. For more information, see *Creating the Organizational Plan* [external document]

Procedure

1. Deactivate the checks in the message layer in Customizing for *SAP Supplier Relationship Management* under ► *SRM Server* → *Cross-Application Basic Settings* → *Message Control* → *Influence Message Control* ◀
 Employees that are assigned to the line organization of the HR organizational model and simultaneously work as purchasers in a SAP SRM purchasing organization can be assigned to the new relationship type "Is Purchaser of...".

In the *Purchasing View* of transaction **PPOMA_BBP** you have several possibilities to assign the purchaser to a purchasing group:

- Using *drag and drop* within the hierarchy
- Using *drag and drop* from the selection area into the hierarchy
- Using the *Assign* button and the search help to find the object to be assigned to the selected unit in the hierarchy.

2.2.2 Where to Find the Documentation for Team Purchasing

To find the documentation for team purchasing in SAP SRM, see Customizing for *SAP Supplier Relationship Management* under ► *SRM Server* → *Cross-Application Basic Settings* → *Define Transaction Types* ⚡.

2.3 Set Up Workflow for Business Scenarios

You use this process to set up the workflow for your business scenario. The configuration steps depend on the workflow framework you use. SAP Supplier Relationship Management (SAP SRM) supports the following workflow frameworks:

- Process-controlled workflow framework

These are approval workflows based on SAP Business Workflow in which the modeled or configured process, and not the application itself, controls the process flow. A unified workflow template is used and a process is evaluated by way of a process schema containing a set of distinct process levels. The Business Rule Framework (BRF) can be applied to control further the process flow.

The process-controlled workflow framework is the default framework in the SAP SRM system.

- Application-controlled workflow framework

These are approval workflows based on SAP Business Workflow in which the application is in control over the SAP Business Workflow templates. Multiple workflow templates can be used, using defined start conditions.

The application-controlled workflow framework is the framework that was available in SAP SRM 5.0 and lower. It is only intended to be used if you are upgrading from SAP SRM 5.0 or lower and you need to continue using your existing workflows.

For more information about the workflow frameworks, see SAP Help Portal at <http://help.sap.com> under ► *SAP Supplier Relationship Management* → *Functions* → *Business Workflow* ⚡.

Prerequisites

You have performed the basic workflow Customizing as described in SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* → *Basic Settings for SAP SRM* → *Cross-Application Settings* → *Business Workflow* ⚡.

Process

Perform the following steps:

- Check which workflow framework is active in your system. To do so, go to Customizing for SAP SRM under ► *SRM Server* → *Cross-Application Basic Settings* → *Business Workflow* → *Select Workflow Framework* ⚡. Select *Show Current Settings* and choose *Execute*.
- If your workflow framework is the **process-controlled workflow framework**, you do not have to perform any scenario-specific Customizing steps. All Customizing steps necessary for this workflow framework are described in SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* → *Basic Settings for SAP SRM* → *Cross-Application Settings* → *Business Workflow* → *Process-Controlled Workflow* ⚡.
- If your workflow framework is the **application-controlled workflow framework**, check whether there is any workflow documentation specific to your scenario in addition to this document in SAP Solution Manager. For example, you might have to activate certain workflow templates, adjust the start conditions for the relevant workflows, or implement a Business Add-In (BAdI). For general configuration information, see SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* → *Basic Settings for SAP SRM* → *Cross-Application Settings* → *Business Workflow* → *Application-Controlled Workflow* ⚡.

More Information

The following scenario-specific workflow documentation is available in SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* ⚡:

- ► *Basic Settings for Service Procurement External Staffing* → *Other Settings* → *Workflow Settings for Business Scenarios* ⚡
- ► *Basic Settings for Strategic Sourcing* → *General Settings* → *Workflow Settings for Business Scenarios* ⚡
- ► *Basic Settings for Contract Management* → *General Settings* → *Workflow Settings for Business Scenarios* ⚡

2.4 Settings for Purchase Orders

2.4.1 Making Settings for Local Purchase Orders

This section describes how to make the required settings for local purchase orders.

Procedure

1. Define number ranges for the local purchase order. For more information, see SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* → *Basic Settings for SAP SRM* → *Cross-Application Settings* → *Number Ranges for Documents* → *Defining Number Ranges* ⚡.
2. Define transaction types for local purchase orders. For more information, see SAP Solution Manager under ► *<project name>* → *Configuration* → *SAP SRM <release>* → *Basic Settings for Service*

Procurement External Staffing → Other Settings → Define Transaction Types → Defining Transaction Types in SAP SRM ↩.

2.4.2 Making Settings for Extended Classic Purchase Orders

This section describes the settings for the extended classic purchase order.

Prerequisites

- You have defined the back-end system with its logical system and its RFC destination.
- To enable the extended classic scenario when using SAP SRM with a back-end system from Release 4.6B upwards, you must transfer a purchasing group when creating a back-end purchase order.

To this end, you have done one of the following:

- If the local purchasing group has a purchasing organization without reference to the back-end system, you have filled the purchasing group parameter, for the RFC user creating the purchase order, with the value of a purchasing group valid in the back-end system.
- In SAP SRM, you have used a purchasing group and a purchasing organization with reference to the back-end system.



NOTE

In the current release, extended classic purchase orders that result from a bidding process can only be created if there is a preceding document, for example, a shopping cart.

Procedure

In Customizing for SAP Supplier Relationship Management (SAP SRM), activate the extended classic scenario by choosing *SRM Server → Cross-Application Basic Settings → Activate Extended Classic Scenario* ↩.



NOTE

When you set the indicator for the extended classic scenario, the purchase order is created in the SAP SRM system and transferred to the back-end system as a copy.

The purchase order in the SAP SRM system is the leading purchase order. The purchase order in the back-end system is a read-only copy that enables goods receipt, service entry, and invoice verification in the back-end system.

You can overwrite these settings with the Business Add-In (BAI) BBP_EXTLOCALPO_BADI in Customizing for SAP SRM, by choosing *SRM Server → Business Add-Ins (BAIs) → Control Extended Classic Scenario* ↩.

- In cases where you use the extended classic scenario, but want to process certain products, product categories, or product types using the classic scenario, you must set the parameter BBP_EXTPO_GL to blank in the method DETERMINE_EXTPO.

- If you do not use the extended classic scenario, you can use the same method to activate the extended classic scenario for the relevant items by setting the parameter `BBP_EXTPO_GL` to X.

2.4.3 Making Settings for Back-End Purchase Orders

Prerequisites



NOTE

You have used identical customizing in the SAP Supplier Relationship Management (SAP SRM) and back-end systems for the following:

- Master data
- Other data such as currencies, payment terms, text IDs or contract transaction types

In the SAP SRM System

You have defined the back-end system as a logical system and entered a corresponding RFC destination. For more information, see *Defining RFC Destination and Back-end System* [external document].

- You have defined the transaction type for purchase orders in the attributes for the user creating the document, in the organizational plan. The transaction type that you define here must be identical to the one that you define as the document type in the back-end system. For more information, see *Creating the Organizational Plan* [external document].
- The internal number range being used for purchase orders in SAP SRM is identical to the external one being used in the back-end system. If you have not maintained different number ranges for different number range objects as described under *Defining Number Ranges* [external document], you can check the default number range in Customizing for SAP SRM, by choosing ► *SRM Server* → *Cross-Application Basic Settings* → *Number Ranges* → *SRM Server Number Ranges* → *Define Number Ranges for Shopping Carts and Follow-on Documents* ◀.
- To enable the use of location-specific items, the table `BBP_LOCMAP` must include the locations for the appropriate back-end system. For more information, see *Making Settings for Locations and Business Partners* [external document].

In the Back-End System

- You are using Release 4.6B or higher with Plug-In 2003.1.
- There is a number range object `BBP_SRV` and internal number assignment for services.
- There is an external number range for purchase orders.

We recommend that you replicate master data such as products, product categories and vendors from the back-end system. For more information, see *Downloading Business Objects* [external document].

Procedure

1. In Customizing for SAP SRM, specify that a purchase order is to be created in the back-end system for a requirement coverage request, by choosing **SRM Server → Cross-Application Basic Settings → Define Objects in Backend System (Purch. Reqs, Reservations, Purch. Orders)**.
2. In Customizing for SAP SRM, determine, for each product category, the back-end system in which you wish to create the purchase order. For more information, see Customizing for SAP SRM under **SRM Server → Technical Basic Settings → Define Backend System for Product Category**.

2.4.4 More Information About Settings for Purchase Orders

Perform the following activities in Customizing for SAP Supplier Relationship Management (SAP SRM):

- **SRM Server → Activate Business Functions**
- **SRM Server → Purchase Order → Activate/Deactivate Contract Item Insertion into Purchase Order**
- **SRM Server → Purchase Order → Activate/Deactivate Default Values for Purchase Order Items**

2.5 Settings for Simplified Shopping Cart

Perform the following activities in Customizing for SAP Supplier Relationship Management (SAP SRM):

- **SRM Server → Activate Business Functions**
- **SRM Server → Cross-Application Basic Settings → Self-Service Procurement → Activate/Deactivate Budget Check for Shopping Cart**
- **SRM Server → Cross-Application Basic Settings → Self-Service Procurement → Disable/Enable Automatic Assignment of Sources of Supply**

2.6 Procurement Card

2.6.1 Setting Up Procurement Card Payment

In SAP Supplier Relationship Management (SAP SRM), you can specify procurement cards as the payment method when you purchase items, provided you are using the *Materials Management* functions in SAP SRM. In addition, you can manage settlements for purchases made using a procurement card. This means you can transfer the settlement file that the bank or card company sends you to SAP SRM to check that the contents are correct and specify account assignments.

Prerequisites

- You are using the *Materials Management* functions in SAP SRM.
- In the back-end system, Accounting is set up, and the card company is created as a supplier.

- You have set up the ALE distribution model in Customizing for *SAP Supplier Relationship Management* under ► *SRM Server* → *Technical Basic Settings* → *ALE Settings* → *ALE Settings (Logical System)* ◀

Procedure

1. Enter your procurement card details using the *Create User* transaction.
The settlement files are transferred to the SAP SRM system, and invoices and transaction figures are transferred from the SAP SRM system to the back-end system by the ALE interface.



NOTE

You must set the procurement cards up so that the system can transfer the settlement information from the card company, and carry out updates in Accounting in the back-end system

2. If you want to create commitments, do so in Customizing for *SAP Supplier Relationship Management* under ► *SRM Server* → *Procurement Card* → *Manage Commitments* ◀

More Information

See SAP Help Portal at help.sap.com under *SAP Business Suite* ► *SAP Supplier Relationship Management* ◀.

2.6.2 More Information About Procurement Card

Perform the following activities in Customizing for SAP SRM:

- ► *SRM Server* → *Procurement Card* → *Process Procurement Card* ◀
- ► *SRM Server* → *Procurement Card* → *Define Number Ranges* ◀
- ► *SRM Server* → *Procurement Card* → *Allocate Company Code* ◀
- ► *SRM Server* → *Procurement Card* → *Define Card Company* ◀
- ► *SRM Server* → *Procurement Card* → *Define Blocking Reasons* ◀

2.7 Reports in Self-Service Procurement

This document lists all the relevant queries for reports in Self-Service Procurement.

Prerequisites

- You have completed all the configuration steps for SAP NetWeaver BW in SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ◀.
- You have installed and activated all the relevant business content for this scenario. For a list of the data source and ODS objects that you must install, see SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ◀.

Features

The following is a list of queries that are relevant for this scenario:

2.7 Reports in Self-Service Procurement

Query Description	Query Name
Shopping Carts Still to be Approved	0BBP_SCA_Q003
Shopping Carts per Approver	0BBP_SCA_Q0012
Shopping Carts per Catalog	0BBP_SC_Q006
Shopping Carts per Contract	0BBP_SC_Q011
Shopping Carts per Cost Center	0BBP_SC_Q009
Shopping Carts per Order	0BBP_SC_Q010
Shopping Carts per Product / Product Category	0BBP_SC_Q004
Shopping Carts per Purchasing Organization / Purch. Group	0BBP_SC_Q005
Shopping Carts per Requester	0BBP_SC_Q003
Shopping Carts per Shopping Cart Number	0BBP_SC_Q001
Shopping Carts per Shopping Cart Number with Items	0BBP_SC_Q002
Status of Shopping Carts	0BBP_SC_Q007
Approval Times	0BBP_SCA_Q001
Overview of Approved Shopping Carts	0BBP_SCA_Q002
Overview of Shopping Carts per Approver	0BBP_SCA_Q004
SRM Manager - Overview of Approvals	0BBP_SC_Q014
Number of Shopping Cart Items	0BBP_SC_Q008
Shopping cart values by purchasing groups	0SR_MC01_Q0708
Shopping cart values for top spending value purchasing group	0SR_MC01_Q0710

The following are queries for purchase order and confirmation reports, based on shopping cart requisitions:

Query Description	Query Name
Accepted Purchase Order Quantities per PO and Item	0SR_PO_C1_Q0006
Confirmation Document Overview	0SR_MC02_Q2001
Cost Center Overview	0SR_C02_Q0002
Deadline Monitoring - Current Values for Req. Delivery Date	0SR_PO_C1_Q0005
Delivery Delays	0SR_MC02_Q0006
Document count - POs, shopping carts	0SR_MC01_Q0715
Excessive Invoices	0SR_MC02_Q3002
Goods and Services Confirmations per Document Number	0SRCF_D2_Q0001
Invoice Document Overview	0SR_MC02_Q3001
Invoice Status	0SRIV_D3_Q0003
Invoices per Contract	0SRIV_D3_Q0005
Invoices per Invoice Number with Items	0SRIV_D3_Q0004
Invoices per Product / Product Category	0SRIV_D3_Q0002
Invoices per Supplier	0SRIV_D3_Q0001
Key Performance Indicators	0SR_MC01_Q0004
Maverick Buying Analysis	0SR_MC02_Q0002

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Number of Suppliers per Country	0SR_MC01_Q0006
Number of categories where PO value w/o contract > X	0SR_MC01_Q0711
Number of suppliers by category	0SR_MC01_Q0709
Open Approvals: Confirmations	0SRCF_D2_Q0003
Open Items (Confirmations)	0SR_MC02_Q2002
Open Items (Invoices)	0SR_PO_C1_Q0003
Open Items Confirmations	0SR_PO_C1_Q0002
Overview of Purchase Order Value per Requester	0SR_C02_Q0001
Overview of Return Deliveries	0SRCF_D2_Q0004
Pareto Analysis According to PO Volume per Category	0SR_MC02_Q0005
Pareto Analysis According to Purchase Order Volume (Chart)	0SR_MC02_Q0004
Purchase Order Document Analysis	0SR_MC02_Q0001
Purchase Order Values per Procurement Card	0SR_C01_Q0001
Purchase Orders per Order Number with Items	0SRAC_D4_Q0002
Purchase Orders per Product /Product Category	0SRAC_D4_Q0004
Purchase Values per Order	0SR_C02_Q0003
Status of Goods and Services Confirmation Documents	0SRCF_D2_Q0002
Variance Invoice Value - Order Value	0SR_PO_C1_Q0004
Workload per Purchasing Group	0SR_MC02_Q0003
Purchase Order Status	0SRAC_D4_Q0001

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3 Self-Service Procurement

3.1 Self-Service Procurement Classic

You can find a scenario description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Self-Service Procurement Classic* ◀. Select the *Documentation* tab.

The SAP SRM 7.0 scenario and process descriptions are also available on SAP Help Portal at <http://help.sap.com> ► *SAP Supplier Relationship Management* → *Business Scenarios* ◀.

3.1.1 Processing Shopping Carts

The process *Processing Shopping Carts* consists of the following process steps:

1. Create shopping cart
2. Search for products or services
3. Select items and add to shopping cart
4. Display overview
5. Display account assignment
6. Order shopping cart
7. Check shopping cart status
8. Approve shopping cart

You can find a process description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Self-Service Procurement Classic* → *Business Processes* → *Processing Shopping Carts* ◀. Select the *Documentation* tab.

3.1.1.1 Configuration Content for Processing Shopping Carts

Create Shopping Cart

Perform the following activities in Customizing for SAP SRM:

- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Shopping Cart: Determine Responsible Purchasing Group(s)* ◀
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Determine Backend System / Company Code* ◀
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Determine Target Object in BE System* ◀
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Shopping Cart Monitor: Modify Object* ◀

3.1 Self-Service Procurement Classic

- ► SRM Server → Business Add-Ins → Shopping Carts and Requirement Items → Shopping Cart Monitor: Adjust User-Interface Content ◀

Search for products or services

Perform the following activities in Customizing for SAP SRM:

- ► SRM Server → Cross-Application Basic Settings → Roles → Define Roles ◀
- ► SRM Server → Business Add-Ins → External Web Services (Catalogs, Supplier Lists and so on) → Transfer Shopping Cart from Catalog ◀
- ► SRM Server → Business Add-Ins → External Web Services (Catalogs, Supplier Lists and so on) → Transfer Additional Parameters ◀

Run the following system transactions in SAP SRM: *Change Attributes* (PPOMA_BBP)

3.1.2 Processing Purchase Requisitions in SAP ERP

The process *Processing Purchase Requisitions in SAP ERP* consists of the following process steps:

1. Create or process purchase requisitions
2. Release purchase requisitions
3. Assign source of supply to purchase requisitions
4. Generate or manage versions of purchase requisitions
5. Monitor or view list display of purchase requisitions

You can find a process description in SAP Solution Manager under ► <project name> → Scenarios → Self-Service Procurement Classic → Business Processes → *Processing Purchase Requisitions in SAP ERP* ◀.

Select the *Documentation* tab. To find the process-related configuration content, select the *Configuration* tab.

3.1.3 Processing Purchase Orders in SAP ERP

The process *Processing Purchase Orders in SAP ERP* consists of the following process steps:

1. Create or process purchase orders
2. Release purchasing documents
3. Find new source of supply
4. Compare quotations
5. Generate or manage versions of purchase orders
6. Monitor the output of messages
7. Monitor or view list display of purchase orders

You can find a process description in SAP Solution Manager under ► <project name> → Scenarios → Self-Service Procurement Classic → Business Processes → *Processing Purchase Orders in SAP ERP* ◀.

Select the *Documentation* tab. To find the process-related configuration content, select the *Configuration* tab.

3.1.4 Inbound Processing and Receipt Confirmation with Warehouse Management

The process Inbound Processing and Receipt Confirmation with Warehouse Management consists of the following process steps:

1. Receive advanced shipping notification
2. Create inbound delivery (optional)
3. Post goods receipt
4. Create Warehouse Management transfer order
5. Confirm Warehouse Management transfer order
6. Send proof of delivery (POD)

You can find a process description in SAP Solution Manager under ► *project name* → *Scenarios* → *Plan-Driven Procurement with Plant Maintenance* → *Business Processes* → *Inbound Processing and Receipt Confirmation with Warehouse Management* ◀. Select the *Documentation* tab.

3.1.5 Verifying Logistics Invoices Online

The process Verifying Logistics Invoices Online consists of the following process steps:

1. Park invoice
2. Create or process invoices online
3. Release invoice
4. Cancel invoice
5. Transmit invoice
6. View list display of invoices
7. Perform Revaluation

You can find a process description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Plan-Driven Procurement with Plant Maintenance* → *Business Processes* → *Verifying Logistics Invoices Online* ◀. Select the *Documentation* tab.

3.1.6 Analyzing Self-Service Procurement

The process *Analyzing Self-Service Procurement* consists of the following process steps:

1. System collects data
2. View reports
3. Work with reports

You can find a process description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Self-Service Procurement Classic* → *Business Processes* → *Analyzing Self-Service Procurement* ◀. Select the *Documentation* tab.

3.1.6.1 Reports in Self-Service Procurement

This document lists all the relevant queries for reports in Self-Service Procurement.

Prerequisites

- You have completed all the configuration steps for SAP NetWeaver BW in SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ⚡.
- You have installed and activated all the relevant business content for this scenario. For a list of the data source and ODS objects that you must install, see SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ⚡.

Features

The following is a list of queries that are relevant for this scenario:

Query Description	Query Name
Shopping Carts Still to be Approved	0BBP_SCA_Q003
Shopping Carts per Approver	0BBP_SCA_Q0012
Shopping Carts per Catalog	0BBP_SC_Q006
Shopping Carts per Contract	0BBP_SC_Q011
Shopping Carts per Cost Center	0BBP_SC_Q009
Shopping Carts per Order	0BBP_SC_Q010
Shopping Carts per Product / Product Category	0BBP_SC_Q004
Shopping Carts per Purchasing Organization / Purch. Group	0BBP_SC_Q005
Shopping Carts per Requester	0BBP_SC_Q003
Shopping Carts per Shopping Cart Number	0BBP_SC_Q001
Shopping Carts per Shopping Cart Number with Items	0BBP_SC_Q002
Status of Shopping Carts	0BBP_SC_Q007
Approval Times	0BBP_SCA_Q001
Overview of Approved Shopping Carts	0BBP_SCA_Q002
Overview of Shopping Carts per Approver	0BBP_SCA_Q004
SRM Manager - Overview of Approvals	0BBP_SC_Q014
Number of Shopping Cart Items	0BBP_SC_Q008
Shopping cart values by purchasing groups	0SR_MC01_Q0708
Shopping cart values for top spending value purchasing group	0SR_MC01_Q0710

The following are queries for purchase order and confirmation reports, based on shopping cart requisitions:

Query Description	Query Name
Accepted Purchase Order Quantities per PO and Item	0SR_PO_C1_Q0006
Confirmation Document Overview	0SR_MC02_Q2001
Cost Center Overview	0SR_C02_Q0002
Deadline Monitoring - Current Values for Req. Delivery Date	0SR_PO_C1_Q0005

Delivery Delays	0SR_MC02_Q0006
Document count - POs, shopping carts	0SR_MC01_Q0715
Excessive Invoices	0SR_MC02_Q3002
Goods and Services Confirmations per Document Number	0SRCF_D2_Q0001
Invoice Document Overview	0SR_MC02_Q3001
Invoice Status	0SRIV_D3_Q0003
Invoices per Contract	0SRIV_D3_Q0005
Invoices per Invoice Number with Items	0SRIV_D3_Q0004
Invoices per Product / Product Category	0SRIV_D3_Q0002
Invoices per Supplier	0SRIV_D3_Q0001
Key Performance Indicators	0SR_MC01_Q0004
Maverick Buying Analysis	0SR_MC02_Q0002
Number of Suppliers per Country	0SR_MC01_Q0006
Number of categories where PO value w/o contract > X	0SR_MC01_Q0711
Number of suppliers by category	0SR_MC01_Q0709
Open Approvals: Confirmations	0SRCF_D2_Q0003
Open Items (Confirmations)	0SR_MC02_Q2002
Open Items (Invoices)	0SR_PO_C1_Q0003
Open Items Confirmations	0SR_PO_C1_Q0002
Overview of Purchase Order Value per Requester	0SR_C02_Q0001
Overview of Return Deliveries	0SRCF_D2_Q0004
Pareto Analysis According to PO Volume per Category	0SR_MC02_Q0005
Pareto Analysis According to Purchase Order Volume (Chart)	0SR_MC02_Q0004
Purchase Order Document Analysis	0SR_MC02_Q0001
Purchase Order Values per Procurement Card	0SR_C01_Q0001
Purchase Orders per Order Number with Items	0SRAC_D4_Q0002
Purchase Orders per Product / Product Category	0SRAC_D4_Q0004
Purchase Values per Order	0SR_C02_Q0003
Status of Goods and Services Confirmation Documents	0SRCF_D2_Q0002
Variance Invoice Value - Order Value	0SR_PO_C1_Q0004
Workload per Purchasing Group	0SR_MC02_Q0003
Purchase Order Status	0SRAC_D4_Q0001

3.2 Self-Service Procurement Extended Classic

You can find a scenario description in SAP Solution Manager under ► <project name> → Scenarios → Self-Service Procurement Extended Classic ◀. Select the Documentation tab.

The SAP SRM 7.0 scenario and process descriptions are also available on SAP Help Portal at <http://help.sap.com> ► SAP Supplier Relationship Management → Business Scenarios ◀.

3.2.1 Processing Shopping Carts

The process *Processing Shopping Carts* consists of the following process steps:

1. Create shopping cart
2. Search for products or services
3. Select items and add to shopping cart
4. Display overview
5. Display account assignment
6. Order shopping cart
7. Check shopping cart status
8. Approve shopping cart

You can find a process description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Self-Service Procurement Classic* → *Business Processes* → *Processing Shopping Carts* ⚡. Select the *Documentation* tab.

3.2.1.1 Configuration Content for Processing Shopping Carts

Create Shopping Cart

Perform the following activities in Customizing for SAP SRM:

- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Shopping Cart: Determine Responsible Purchasing Group(s)* ⚡
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Determine Backend System / Company Code* ⚡
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Determine Target Object in BE System* ⚡
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Shopping Cart Monitor: Modify Object* ⚡
- ► *SRM Server* → *Business Add-Ins* → *Shopping Carts and Requirement Items* → *Shopping Cart Monitor: Adjust User-Interface Content* ⚡

Search for products or services

Perform the following activities in Customizing for SAP SRM:

- ► *SRM Server* → *Cross-Application Basic Settings* → *Roles* → *Define Roles* ⚡
- ► *SRM Server* → *Business Add-Ins* → *External Web Services (Catalogs, Supplier Lists and so on)* → *Transfer Shopping Cart from Catalog* ⚡
- ► *SRM Server* → *Business Add-Ins* → *External Web Services (Catalogs, Supplier Lists and so on)* → *Transfer Additional Parameters* ⚡

Run the following system transactions in SAP SRM: *Change Attributes* (**PPOMA_BBP**)

3.2.2 Searching for Sources of Supply Centrally

The process *Searching for Sources of Supply Centrally* consists of the following process steps:

1. Start sourcing application
2. Search for appropriate source of supply
3. Assign contract
4. Assign supplier
5. Create RFx from sourcing application
6. Create auction from sourcing application
7. Process workload distribution
8. Create purchase order from sourcing application
9. Create contract from sourcing application

You can find a process description in SAP Solution Manager under ► <project name> → Scenarios → Self-Service Procurement Extended Classic → Business Processes → Searching for Sources of Supply Centrally ◀.

3.2.2.1 Configuration Content for Searching for Sources of Supply Centrally

Perform the following activities in Customizing for SAP SRM:

- ► SRM Server → Business Add-Ins → Changes to Purchasing Document Data ◀
- ► SRM Server → Business Add-Ins → RFx → Control of RFx Publication ◀
- ► SRM Server → Business Add-Ins → RFx → Subsequent Split of Grouping ◀
- ► SRM Server → Cross-Application Basic Settings → Configure Priorities ◀
- ► SRM Server → Business Add-Ins → Interface Configuration → Appearance of Priorities ◀
- ► SRM Server → Business Add-Ins → Sourcing → Redetermination of the Contract To Be Used (Quota Arrangement) ◀
- ► SRM Server → Activate Business Functions ◀
- ► SRM Server → Cross-Application Basic Settings → Service Procurement → Activate Service Procurement Innovations ◀
- ► SRM Server → Cross-Application Basic Settings → Service Procurement → Activate Central Contract Management Innovations ◀

Run the following system transaction in SAP SRM: ABAP Editor (**se38**)

3.2.3 Processing Purchase Orders in SAP SRM

The process *Processing Purchase Orders in SAP SRM* contains the following process steps:

- Select source of supply
- Create or update purchase order

- Process workload reassignment
- Approve purchase order
- Send purchase order to supplier
- Create purchase order response
- Compare purchase order response with purchase order

You can find a process description in SAP Solution Manager under ► *<project name>* → *Scenarios* → *Service Procurement External Staffing* → *Business Processes* → *Processing Purchase Orders in SAP SRM* ◀. Select the *Documentation* tab.

3.2.3.1 Basic Settings for Processing Purchase Orders in SAP SRM

This section of the SAP Solution Manager structure contains the process documentation, web transactions, and configuration information for the business process *Processing Purchase Orders in SAP SRM*.

Before you carry out the configuration steps contained in this section, ensure that you have already completed the basic settings for Service Procurement and Plan-Driven Procurement. You can find these steps in SAP Solution Manager, under ► *Configuration* → *SAP SRM 7.0 EHP1* → *Basic Settings for Service Procurement/Basic Settings for Plan-Driven Procurement* ◀.

3.2.3.2 Defining Message Control for Limit Purchase Orders

To use limit purchase orders in supplier self-services, you must adjust XML message control settings in Customizing for SAP Supplier Relationship Management (SAP SRM).

This customizing activity ensures that the product category field appears in SAP SRM when you send a confirmation for a limit purchase order to SAP SRM. This setting is necessary to ensure that the confirmation is created in SAP SRM since without it the confirmation is automatically set to *Rejected* in supplier self-services.

Procedure

Go to Customizing for SAP Supplier Relationship Management under ► *SRM Server* → *Cross-Application Basic Settings* → *Message Control* → *Influence Incoming Message Control* ◀

1. Select *Confirmations Goods/Services EC(BUS2203)*.
2. Double-click *XML Message Control*.
3. Select *Enter a Product Category*.
4. Choose *Ignore*.
5. Choose *Save*.

3.2.3.3 Setting Up Extended Classic Scenario

**NOTE**

You cannot run the Service Procurement External Staffing scenario in extended classic mode.

This section describes the settings for connecting a back-end system to SAP SRM and for enabling the extended classic scenario.

Prerequisites

You have set up the following:

- The back-end system with its logical system and its RFC destination has been set up.
- To enable the extended classic scenario for SAP SRM on a back-end system from SAP R/3 Release 4.6 B, you have to specify a purchasing group when you create a back-end purchase order. To this end, you have done one of the following:
 - If the local purchasing group has a purchasing organization with no reference to the back-end system, you must have specified a purchasing group that is valid in the back-end system for the EKG parameter of the RFC user.
 - You have used the customer exits of the BAPIs BAPI_PO_CREATE1 and BAPI_PO_CHANGE to determine the purchasing group.
 - In SAP SRM you use a purchasing group and a purchasing organization with a reference to the back-end system, in the same way as you do for the SAP SRM classic scenario. In this way, you transfer organizational data to the back-end system.

Procedure

Activating the Extended Classic Scenario

If you use the extended classic scenario, you must activate it in SAP SRM.

In Customizing for SAP SRM, activate the extended classic scenario by choosing ► *SRM Server* → *Cross-Application Basic Settings* → *Activate Extended Classic Scenario* ◀.

Implementing a BAdI to Control the Extended Classic Scenario

If you want to control the extended classic scenario in a more differentiated way (for example, depending on product category), you can use an SRM Server Business Add-In (BAdI).

In Customizing for SAP SRM, choose ► *SRM Server* → *Business Add-Ins* → *Control Extended Classic Scenario* → *Activate Extended Classic Scenario* ◀.

3.2.3.4 Defining Sourcing for Product Categories

You use this procedure to specify either that the product category of the requirement is transferred to the Sourcing application or that the system always creates an RFx. In the standard, no requirements are transferred.

Procedure

1. In Customizing for SAP Supplier Relationship Management, go to ► *SRM Server* → *Sourcing* → *Define Sourcing for Product Categories* ⚡.
2. Specify that requirements with the appropriate product categories are transferred to the Sourcing application:
 - Always
 - Only when a source of supply has not yet been assigned
 - Never
 - Auto RFx creation with no source of supply assigned
 - Auto grouping and sourcing with no source of supply assigned
 - Auto grouping but no sourcing for item with no source of supply assigned
 - Auto grouping and creation of RFx with no source of supply assigned

3.2.3.5 Making Settings for Purchase Orders

In the standard configuration of SAP Supplier Relationship Management (SAP SRM) the purchaser's sourcing application is not enabled and the system automatically creates purchase orders for shopping carts that have a unique source of supply assigned to them.

Since this can lead to large number of purchase order documents for the same supplier, SAP SRM provides report `BBP_SC_TRANSFER_GROUPED` that allows you to automatically group requirements belonging to the same supplier before creating a purchase order.

Prerequisites

To use the extended classic scenario and transfer purchase orders to the back-end system, you have to:

- set up an RFC user in the back-end system for the RFC communication with SAP SRM.
- set up an RFC connection between SAP SRM and the back-end system that uses the same RFC user.

Procedure

1. Schedule report `BBP_SC_TRANSFER_GROUPED` periodically. You have to define a variant for running this report, in which you can specify your selection.
For more information on the automated grouping of requirements, see the report documentation in your SAP SRM system.
2. (Optional) To use default values for overdelivery and underdelivery tolerances, make sure the system contains a tolerance group to which the tolerance key **CF** is assigned.
See Customizing for SAP SRM under ► *SAP Supplier Relationship Management* → *SRM Server* → *Cross-Application Basic Settings* → *Set Tolerance Checks* ⚡.
You can enter tolerance values even if you do not specify default values.

3.2.3.6 More Information About Processing Purchase Orders in SAP SRM

Processing Purchase Orders

Perform the following activities in Customizing for SAP Supplier Relationship Management:

- ► SRM Server → Cross-Application Basic Settings → Business Workflow → Activate Asynchronous Processing of Workflow ◀
- ► SRM Server → Cross-Application Basic Settings → Business Workflow → Activate Parallel Approval with Overlapping Responsibility ◀

Select source of supply

Perform the following activities in Customizing for SAP Supplier Relationship Management:

- ► SRM Server → Sourcing → Define Sourcing for Product Categories ◀
- ► SRM Server → Business Add-Ins → Sourcing → Find and Check Sources of Supply ◀
- ► SRM Server → Business Add-Ins → Sourcing → Define Execution of Sourcing ◀

Create or update purchase order

Perform the following activities in Customizing for SAP Supplier Relationship Management:

- ► SRM Server → Cross-Application Basic Settings → Set Tolerance Checks ◀
- ► SRM Server → Business Add-Ins → Follow-On Document Generation in the Backend System → Purchase Order in Backend System ◀

Run transaction *Schedule Background Job* (SM36).

Process workload reassignment

Perform the following activity in Customizing for SAP Supplier Relationship Management:

- ► SRM Server → Business Add-Ins → Changes to Purchasing Group and Purchasing Organization Assignments ◀

Send purchase order to supplier

Perform the following activities in Customizing for SAP Supplier Relationship Management:

- ► SRM Server → Cross-Application Basic Settings → Set Output Actions and Output Format → Define Actions for Document Output ◀
- ► SRM Server → Technical Basic Settings → Assign RFC Destinations Dependent on Scenario ◀

3.2.4 Analyzing Self-Service Procurement

The process *Analyzing Self-Service Procurement* consists of the following process steps:

1. System collects data
2. View reports
3. Work with reports

You can find a process description in SAP Solution Manager under ► <project name> → Scenarios → Self-Service Procurement Classic → Business Processes → Analyzing Self-Service Procurement ◀. Select the *Documentation* tab.

3.2.4.1 Reports in Self-Service Procurement

This document lists all the relevant queries for reports in Self-Service Procurement.

Prerequisites

- You have completed all the configuration steps for SAP NetWeaver BW in SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ⚡.
- You have installed and activated all the relevant business content for this scenario. For a list of the data source and ODS objects that you must install, see SAP Solution Manager under ► *Basic Settings for SAP SRM* → *Basic Settings for Analytics* ⚡.

Features

The following is a list of queries that are relevant for this scenario:

Query Description	Query Name
Shopping Carts Still to be Approved	0BBP_SCA_Q003
Shopping Carts per Approver	0BBP_SCA_Q0012
Shopping Carts per Catalog	0BBP_SC_Q006
Shopping Carts per Contract	0BBP_SC_Q011
Shopping Carts per Cost Center	0BBP_SC_Q009
Shopping Carts per Order	0BBP_SC_Q010
Shopping Carts per Product / Product Category	0BBP_SC_Q004
Shopping Carts per Purchasing Organization / Purch. Group	0BBP_SC_Q005
Shopping Carts per Requester	0BBP_SC_Q003
Shopping Carts per Shopping Cart Number	0BBP_SC_Q001
Shopping Carts per Shopping Cart Number with Items	0BBP_SC_Q002
Status of Shopping Carts	0BBP_SC_Q007
Approval Times	0BBP_SCA_Q001
Overview of Approved Shopping Carts	0BBP_SCA_Q002
Overview of Shopping Carts per Approver	0BBP_SCA_Q004
SRM Manager - Overview of Approvals	0BBP_SC_Q014
Number of Shopping Cart Items	0BBP_SC_Q008
Shopping cart values by purchasing groups	0SR_MC01_Q0708
Shopping cart values for top spending value purchasing group	0SR_MC01_Q0710

The following are queries for purchase order and confirmation reports, based on shopping cart requisitions:

Query Description	Query Name
Accepted Purchase Order Quantities per PO and Item	0SR_PO_C1_Q0006
Confirmation Document Overview	0SR_MC02_Q2001
Cost Center Overview	0SR_C02_Q0002
Deadline Monitoring - Current Values for Req. Delivery Date	0SR_PO_C1_Q0005

3.2 Self-Service Procurement Extended Classic

Delivery Delays	0SR_MC02_Q0006
Document count - POs, shopping carts	0SR_MC01_Q0715
Excessive Invoices	0SR_MC02_Q3002
Goods and Services Confirmations per Document Number	0SRCF_D2_Q0001
Invoice Document Overview	0SR_MC02_Q3001
Invoice Status	0SRIV_D3_Q0003
Invoices per Contract	0SRIV_D3_Q0005
Invoices per Invoice Number with Items	0SRIV_D3_Q0004
Invoices per Product / Product Category	0SRIV_D3_Q0002
Invoices per Supplier	0SRIV_D3_Q0001
Key Performance Indicators	0SR_MC01_Q0004
Maverick Buying Analysis	0SR_MC02_Q0002
Number of Suppliers per Country	0SR_MC01_Q0006
Number of categories where PO value w/o contract > X	0SR_MC01_Q0711
Number of suppliers by category	0SR_MC01_Q0709
Open Approvals: Confirmations	0SRCF_D2_Q0003
Open Items (Confirmations)	0SR_MC02_Q2002
Open Items (Invoices)	0SR_PO_C1_Q0003
Open Items Confirmations	0SR_PO_C1_Q0002
Overview of Purchase Order Value per Requester	0SR_C02_Q0001
Overview of Return Deliveries	0SRCF_D2_Q0004
Pareto Analysis According to PO Volume per Category	0SR_MC02_Q0005
Pareto Analysis According to Purchase Order Volume (Chart)	0SR_MC02_Q0004
Purchase Order Document Analysis	0SR_MC02_Q0001
Purchase Order Values per Procurement Card	0SR_C01_Q0001
Purchase Orders per Order Number with Items	0SRAC_D4_Q0002
Purchase Orders per Product /Product Category	0SRAC_D4_Q0004
Purchase Values per Order	0SR_C02_Q0003
Status of Goods and Services Confirmation Documents	0SRCF_D2_Q0002
Variance Invoice Value - Order Value	0SR_PO_C1_Q0004
Workload per Purchasing Group	0SR_MC02_Q0003
Purchase Order Status	0SRAC_D4_Q0001

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that are printed on both sides.**

A Reference

A.1

Typographic Conventions

Example	Description
<Example>	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, "Enter your <User Name>".
► Example → Example ◀	Arrows separating the parts of a navigation path, for example, menu options
Example	Emphasized words or expressions
Example	Words or characters that you enter in the system exactly as they appear in the documentation
http://www.sap.com	Textual cross-references to an internet address
/example	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
123456	Hyperlink to an SAP Note, for example, SAP Note 123456
Example	- Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. - Cross-references to other documentation or published works
Example	- Output on the screen following a user action, for example, messages - Source code or syntax quoted directly from a program - File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

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Documentation in the SAP Service Marketplace

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